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ABSTRACT

While the lecture method of instruction is a good way to transmit facts and information, techniques that actively involve the ego of the learner are preferable for affecting attitudes and/or developing conceptual skills. One family of such techniques is known as simulation techniques. Two methods widely used in industry and colleges are role playing and the case method. In role playing, group members dramatize situations analogous to the problem on which the group is working. Steps for role playing are topic selection, actor selection, determination of background details and a sketch of roles, training of the audience to observe, enactment, discussion and evaluation, and re-enactment. Role playing develops problem-solving skills and positive social values. The teacher's primary role is that of facilitator. In the case method, a group analyzes a written narrative of a situation or problem. Since cases are learner-based and action-oriented, students gain experience in analysis, creativity, decision making, and in accepting responsibility for future consequences. The instructor may play many different roles during the course, although in practice the instructor's role lies somewhere along a continuum with the facilitator and the demonstrator roles at opposite ends. (YLB)

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# ROLE PLAYING AND THE CASE METHOD IN BUSINESS EDUCATION

by

Avraham Lachs

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ABSTRACT

Just as the successful athlete utilizes more than one exercise or series of exercises to develop his or her body, the skillful teacher must utilize more than one technique for developing the students' minds. The following report investigates the role-playing technique and the case method. The techniques are defined, and the following questions are answered:

1. When should the method be used?
2. What procedures and materials are required?
3. What skills and concepts are developed?
4. What roles does the instructor play?

Along with other teaching innovations, role playing and the case method should be given serious consideration by any teacher interested in helping his or her students become ego-involved in the process of learning. The techniques are particularly useful in shaping attitudes, developing analytical abilities, generating alternative courses of action or solutions to problems, and sharpening decision-making skills. This report provides a sound starting point for the instructor who believes that his or

her students may benefit from such action-oriented and learner-based techniques.

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## INTRODUCTION

It is generally accepted by educators and trainers that the lecture method of instruction is a good way to transmit facts and information (Knowles, 1980, p. 240), (Plunkett, 1983, p. 183). A properly designed lecture combined with handouts, textbooks, employee manuals, or other written material can be of immense help in providing a learner (student, trainee, new employee, etc.) with knowledge. This knowledge can be about the proper procedures an employee must follow in carrying out the routine aspects of his or her job, the steps to take in filling out an application for financial aid, or any other knowledge necessary to perform a task or carry out instructions.

To affect attitudes, or develop conceptual skills, or both, however, it is preferable to use techniques which actively involve the ego of the learner. "...those methods and techniques which involve the individual most deeply in self-directed inquiry will produce the greatest learning. This principle of ego-involvement lies at the heart of the adult educator's art" (Knowles, 1980, p. 56).

One family of techniques for actively involving the

ego of the learner is known as "simulation techniques." While numerous form of training can be listed under the rubric of simulation techniques, two methods widely used in industry and in colleges are role playing and the case method. It is the purpose of this paper to describe these two methods and answer the following questions about them:

1. When should the method be used?
2. What procedures and materials are required?
3. What student skills or concepts are developed?
4. What roles or functions does the instructor play?

The answers to the preceding questions will provide the teacher or trainer with the information necessary to decide which, if either, of these methods would best suit the needs of his or her students. The techniques are not panaceas. They are, however, important methods with which adult educators should be familiar.

# CHAPTER I

# ROLE PLAYING

## Definition

Role playing is "a technique applicable to all forms of discussion" (Phillips, 1973, p. 90). In role playing, group members dramatize situations analogous to the problem the group is working on, and in acting out these situations, members reveal their conflicts, wishes, fears, attitudes, and daydreams. Role playing, according to Phillips (1973, pp. 90-91), can only be used in a problem context and is quite helpful in delineating differences that separate variant points of view.

## When Should Role Playing Be Used?

Role playing is an extremely versatile technique appropriate for use in a wide variety of problem situations. While no attempt will be made to list all possible topics for specific role plays, "it has been used frequently ...on all grade levels from elementary school through university," (Sharan, 1976, p. 166) and has been used successfully in management training and development. "Role playing

is particularly effective when used as an integral part of a curriculum, and not merely as a one-time experience" (Sharan, 1976, p. 166.).

## Procedures

The following steps for role playing have been chosen eclectically from Sharan (1976), Shaftel and Shaftel (1982), and from the author's own experience as an instructor. As will be noted, no special materials or equipment is required.

1. Select the topic. This step can be taken by the instructor, by the class, or by the instructor and the class together.

2. Choose actors. When forming acting groups, it is worth considering the possibilities of dividing the class into two or more role-playing teams, each group with its own actors and observer-audience. (For example, a class of 30 students could be divided into three teams of 10 members each, of whom two, three, or four students could first take the part of actors and the remainder of observers, with the roles alternating during the teams' progress through the role-play sequence.) Actors should be volunteers and should express a reasonable interest in their roles.

3. Determine background details and provide a general sketch of the roles to be played. To ensure spontaneity, there is no script to learn; and players do not rehearse before the performance. The planning stage consists of setting general guidelines for the scene (such as a supervisor's office) and a general description of the opening action (such as an employee's receiving a mediocre performance evaluation). The unfolding of the scene occurs entirely as a result of the actors' reactions to each other in keeping with their grasp of the roles.

4. Train the audience to observe with specific aims. The observers must be coached in advance to ensure a productive discussion so that they do not view their task as the imposition of irrelevant goals on the role play. If criticism takes place, it should be directed only toward the <u>role</u> and not toward the player. Furthermore, since the quality of acting is not an object of evaluation, actors should not be praised or criticized for how well they acted. The criteria for

evaluating the portrayal are: To what extent did it portray the situation as described in the initial guidelines; what were the thoughts and feelings expressed in the scene; and did the experience provide an opportunity for reality practice for both actors and audience?

5. Enact the role-play session. At this stage comes the actual portrayal of the scene as authentically and spontaneously as possible. The length of the scene may be as short as 15 minutes to as long as several hours. As long as the play is proceeding with spontaneity and the discussion is lively, it should continue to its natural conclusion. Very long scenes should be broken up, however, into short segments. The play may be performed for an hour a day over a period of days, for example.

6. Players and observers discuss and evaluate the role play. The players themselves should be the first to speak immediately after the play. They should tell the others about their own thoughts and feelings as they performed their roles and should also give their opinions on thoughts and feelings expressed by the other actors. The teacher should encourage students to describe similar situations in their own lives and suggest alternative solutions. These suggestions can then be used as the basis for a re-enactment by the same or other players.

7. Re-enactment. While this step is not imperative, it seems, in the author's opinion, to be desirable if time permits. A re-enactment gives the students the opportunity to repeat the role-playing situations so they can actually practice behavioral skills and not rest content merely with the theoretical comments made during the post-play discussion.

## Skills and Concepts Developed

The goal of role playing is to "increase [participants'] understanding of the human feelings, perceptions, and acts involved in the situation under observation and contribute to their ability to behave more effectively when similar situations arise again" (Sharan, 1976, p. 160). Role playing is not intended to transfer factual knowledge, rather it is designed to clarify the how and the why of people's

behavior toward each other (Shaftel and Shaftel, 1982, p. 14).

Since our behavior toward others is influenced by our understanding of them, it stands to reason that improving our understanding will influence our attitudes. "The assumption is that giving students repeated role-taking experiences will help them cultivate greater sensitivity toward and understanding of other people; this change in attitude could equally result in a change in behavior" (Sharan, 1976, p. 163).

Thus, role playing offers a technique for the explicit development of positive social attitudes. Students are able to practice their behavior in various problematic situations so that they can, in a relatively anxiety-free situation, learn to cope with situations and solve problems. Circumstances can be recreated with the aim of improving behavior and acquiring more effective social skills.

## Roles of the Instructor

Since role playing is based on the assumption that the students themselves must discover the implications of the relationships presented, the teacher's primary role is that of facilitating, not directing the play. The teacher's role is not completely nondirective, however. He or she assists with the minimum organizing needed to get a group started and may help decide who plays which roles. "The teacher could certainly intervene, criticize, or offer suggestions if extremely negative, vulgar, or aggressive behavior is displayed, but this is exceedingly rare" (Sharan, 1976, p. 179).

Shaftel and Shaftel (1982, pp. 77-78) list 10 functions of the instructor in guiding role playing among children. The author has adapted their list for the teaching of adults.

1. Listen carefully to what each student says.

2. Keep your responses in line with what the student is saying.

3. Select some comments for immediate consideration because they hook onto the action or elaborate on a previous condition. The instructor may have to tell some students to hold their comments for a while, as new ideas will be dealt with later.

4. Guide students to think with one another. For example: "Let's help John work out his idea. What did he tell us in his acting? What do you think about it?"

5. Sustain the student in his or her thinking. When a student expresses an idea, encourage him or her to expand on it.

6. Point out differences in ideas. When enough enactments have occurred to provide a number of alternatives and controversy occurs, help delineate the differences in ideas and ask students <u>why</u> they see the situation as they do.

7. Explore the complexity of situations by saying, for example, "How many things do we have to think of before we can decide...?"

8. Raise the level of understanding by restating positions.

9. Invite other students to respond to a student's idea; then come back to him or her for a further response.

10. Ask questions to widen the discussion. To lift some students out of their preoccupation with their own immediate proposals to wider considerations, the instructor may ask: "Do you know someone who may have handled this situation differently?" or "Why does Avi behave as he does?" or "Why do you think problems like this arise?"

## Conclusion and Implications

Role playing is a process for stimulating critical thinking and developing problem-solving skills. As a method it can benefit students by helping delineate a problem, stimulate communication and develop empathy, create awareness of the need for skills, and stimulate the decision-making process. Like the case method, which follows in Chapter 2, role playing helps participants develop their own problem-solving abilities rather than depending on the teacher to provide the answers. When designing their programs and curricula, instructors should consider this powerful technique for developing positive social attitudes and increasing the understanding of human actions and feelings.

## CHAPTER II

## THE CASE METHOD

### Definition

"The case method is a valuable educational tool and of considerable worth in initiating problem solving" (Phillips, 1973, p. 91). In the case method, a written narrative of a situation or problem is given to the group or class. The case is selected to illustrate major ideas that the group will cover in an ensuing discussion. Members normally participate in a nondirected analysis of the case, although some instructors prefer a guided analysis. In the classroom, the case method makes it possible for an instructor to direct students' deliberations to an issue illustrative of material they have learned.

### When Should the Case Method Be Used?

Like role playing, the case method is used to sharpen students' problem-solving skills. Whereas role playing is primarily used to teach or illustrate problems in human relations, however, the case method has far broader usage; and a well-written case can even serve as the basis for a role play.

The case method was pioneered by the Harvard Schools of Law and Business in 1908, and "...its widest use [still] seems to be in law and business training" (Matejka and Cosse, 1981, p. 1). Nonetheless, other disciplines, such as education, have embraced the case method; and cases have been designed for use in teaching, nursing, production management, marketing, sociology, and accounting, to name just a few. "Policy cases" are designed to simulate an overall view of an organization and are intended to develop conceptual skills for helping students understand a coordinated organizational effort.

While each educational method has its own unique strengths which make it appropriate at certain times, the case method, when well done, provides an opportunity to use several different educational tools within one framework. Cases are learner-based and action-oriented educational media which provide "unique and valuable learning opportunities that are not combined in any other current teaching method" (Matejka and Cosse, 1981, p. 9).

## Required Materials

As in role playing, a minimum of physical materials is required. Besides the meeting room and tables and chairs, the only mandatory materials are a blackboard (or other writing surface) and the cases themselves. While it is beyond the stated purpose of this paper to discuss the design of meeting rooms, some comments regarding room size are found on page 14. The reader desiring in-depth

information on classroom design is referred to Knowles (1980, pp. 163-166).

## Skills and Concepts Developed

As stated on the preceding page, cases are learner based and action oriented. Thus, the students have the responsibility of being active participants, while the instructor (as in role playing) is the facilitator. In case analysis, learning takes place by doing. The student is placed in a simulation of the real world of business, law, education, or other area. Then by analyzing the situations, making appropriate assumptions, and developing and examining alternative courses of action, students are able to choose the alternatives that they feel best solve the problems in the case. The spirit of realism is further enhanced when the students communicate their ideas and decisions to other students and the instructor, just as business managers or teachers would exchange ideas and decisions with their peers and their bosses. Finally, students learn that they must ultimately accept responsibility for their own decisions.

By drawing upon the research of Powell Niland (1972, pp. 11-16), the author has developed the following list of skills that can reasonably be expected to be learned by students studying by the case method.

1. The student learns to think like an administrator. By reading about actual administrators and managers, the student gains experience by learning about their operating environment, their decisions, and, sometimes, the results of those decisions. Thus, the student gains skill at interpreting situations, allocating resources, understanding human beings and the process

of administration, and acquires some feel for the reactions of peers and superiors to his or her ideas.

2. Students learn how to use and apply their knowledge. Cases force students to use and apply the extensive factual and theoretical knowledge they have acquired throughout life or through research activities performed for the sake of the case. With the help of peers and the instructor, the students learn to cope with various complex situations, and they develop a methodology for future use.

3. Students gain practice in decision making. Case analyses require students to assume the role of the decision maker. Thus, they must decide what should be done to ease a problem situation or maintain a satisfactory one. While the case method requires students to take responsibility for their decisions, it does so in a relatively free, nonthreatening environment, which helps students develop self-confidence in their abilities to make decisions.

4. Students develop the skill required to use others as resources. One of the basic premises of the case method is that people learn from each other by sharing information and ideas. Working on cases gives students experience dealing with and through other people; and it helps the student see the group as a resource just like books, periodicals, the instructor, or money.

5. Cases encourage students to think analytically and objectively. Cases are like puzzles. They are complex and present numerous variables and possibilities which necessitate a thorough, systematic mental approach. Facts and inferences are presented side by side and must be untangled. Objectivity and subjectivity are expressed to varying degrees, and students must become adept at segregating the information into useful and manageable portions.

6. Students develop initiative. In a case class, the large amount of information found in cases plus the number of cases analyzed during the semester create tremendous time pressures under which the students must act. Hence, self-starting, an extremely valuable trait for the educated person, is encouraged and nurtured through the use of cases.

7. Skill in projecting outcomes is developed. To successfully choose among the available alternatives, students must be able to project each alternative into the future. While no one can predict the future with total accuracy, dealing with anticipated consequences forces the students to plan for the future of their recommended alternatives.

## Roles of the Instructor

The first responsibility of the instructor is to plan the course as a whole and prepare an outline or syllabus so that students will have a clear picture of the objectives and learning expectations of the course, what assignments are due and when, and what the grading criteria (if any) are. The instructor should also make pellucid his or her policies regarding attendence, student preparedness, and class participation expectations.

While andragogical principles suggest that students participate in the selection of cases, in a typical one-semester college course, such participation may not be feasible. Since students are expected to be exposed to numerous concepts throughout the semester, and since it is necessary to choose eclectically those cases which best demonstrate those concepts, case selection must usually be performed by the instructor. Full-time students are normally so weighted down with assignments from a number of courses that they do not have the time to analyze dozens of cases in an effort to select the eight or nine best cases for the course. Individual students <u>should</u> be given some degree of freedom, however, in selecting which case or cases he or she would like to work on in those classes where cases are presented by individuals or teams rather than by the class as a whole. In an industrial setting, employee committees or supervisors may give the instructor greater input regarding the cases that they wish to have taught.

It is also the duty of the instructor to select the classroom if a variety of rooms is available.

> It is the teacher's responsibility to get the right type of classroom, large enough to seat everyone comfortably, but small enough for spirited debate in a friendly, informal atmosphere. Too many permanently empty seats can inhibit discussion, and a classroom that is too large will distort voices. (Charan, 1976, p. 117)

Variety of Roles

Regarding the role that the instructor plays during the course, John Kotter (1979, pp. 9-11) has identified 18 different roles that the instructor may play. They are: facilitator, demonstrator, coach, quarterback, prod, referee, dance master, choreographer, prosecutor, evangelist, judge, conductor, soothsayer, lion tamer, district attorney, senior airline captain, Will Rogers, and Aesop. Note that the role of lecturer is left out.

While it is useful to be aware of the variety of role options available to the instructor, in practice the instructor's role lies somewhere along a continuum with the facilitator role at one end and the demonstrator role at the other. In the facilitator role, the instructor is passive, and the students' role is active. The instructor is a peer, a friend, and a member of the class.

In the demonstrator role, on the other hand, the instructor is active, and the students are passive. He or she is the leader, directs the discussion, and may give partial analysis when a particular point needs to be made or emphasized. Regardless of where the instructor's style

falls on the continuum, however, he or she must go beyond simply knowing the case well. "The instructor should internalize the case to the extent of being prepared [where possible] without having to rely on notes" (Charan, 1976, p. 117).

Summarizing

To keep the discussion flowing, the instructor should summarize periodically and introduce carefully planned questions to highlight certain concepts. Examples of such questions are: "Where have we been?" "What do you think about that now?" "Has anyone's decision changed?"

Instructors, however, should judiciously avoid leading questions which fish for "pet answers." Such questions might cause students to feel that they are being manipulated. The responsibility of the instructor is to provide students with a vehicle through which they can practice analyzing situations, drawing conclusions, and making decisions. The instructor adopts the role and assigns tasks and responsibilities to create an atmosphere that he or she believes will best fulfill his or her obligations to the students.

## Conclusion and Implications

The popularity of the case method rests on the belief that "wisdom can't be told" (Gragg, 1954, p. 6). That is, one must experience situations to truly learn. The case method allows students to vicariously participate in true-

to-life situations in business, law, education, or other discipline. Thus, the student gains experience in analysis, creativity, decision making, and responsibility for future consequences. By designing cases into their programs and curricula, skillful teachers can provide an exciting educational atmosphere and provide a challenging task for themselves as well as for their students.

## CHAPTER III

## CONCLUSIONS AND RECOMMENDATIONS

Role playing and the case method are two invigorating educational techniques that provide refreshing and beneficial alternatives to the lecture method. Although the lecture method is the preferred technique for transmitting information, it is usually less than satisfactory for affecting students' attitudes and developing conceptual skills.

Role playing and the case method have been proven beneficial in developing skills and influencing attitudes by actively involving the egos of the participating students. Hence, it is recommended that teachers of adults investigate the feasibility of including one or both methods in their instructional repertoires. As stated on pages three and four, "Role playing is particularly effective when used as an integral part of a curriculum, and not merely as a one-time experience" (Sharan, 1976, p. 166). The same conclusion can be drawn for the case method.

The bibliography on page 19 provides a starting point for the teacher interested in further research, and the reader's attention is especially directed to the Matejka

and Shaftel sources. These books not only provide a wealth of information by themselves; they also contain extensive bibliographies for additional research.

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